Alberta Tourism Market Monitor

National Parks had outstanding year in 2015

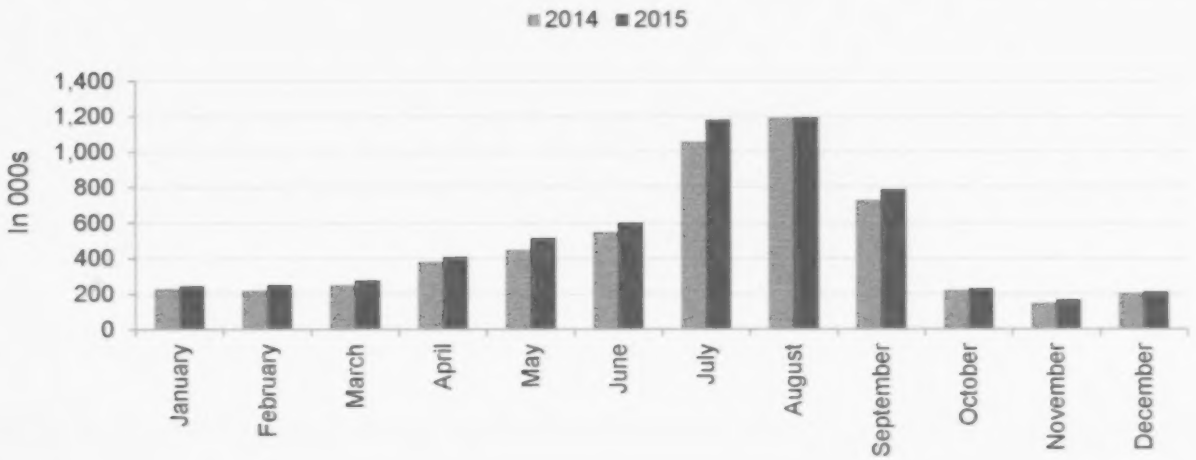
Banff, Jasper and Waterton Lakes National Parks had a remarkable year in 2015. Banff National Park welcomed 3.6 million independent visitors in 2015 - the highest number since 2003 (when about 4.6 million visitors were recorded).This represents growth of 8.1% compared to 2014 (with 2014 also being a very successful year in terms of visitor numbers to Banff National Park). Jasper National Park recorded 2 million visitors from January to December in 2015, a growth rate of 5.3% from 2014, despite a 2% drop in December compared to the same month of last year. In addition, Waterton Lakes National Park reported 477,000 visitors in 2015; an increase of 15.3% from 2014. This is the highest number of visitors for this Park in its history.

For more information please contact Emily Wang at emily.wang@gov.ab.ca or 780-427-6206

On average, more than 500,000 independent visitors travelled to the three National Parks combined in each month of 2015. There are definite seasonal trends with regards to visitation to the National Parks: the largest number of people visit during the summer months (specifically July and August), while visitation is lower during the shoulder seasons (spring and fall). November is typically the month with the lowest visitation.

It is expected that 2017 will be another record year for visitation, with Parks Canada's announcement of free admission to National Parks in 2017 to celebrate the 150th anniversary of Canada's Confederation.

Visitors to Banff, Jasper and Waterton Lakes National Parks



Alberta Government

2015/16 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2015 (000's of arrivals and departures) [1]													
Edmonton International Total	582.1p	561.6p	613.8p	592.7p	565.5p	598.8r	683.7r	710.0p	602.1p	594.9p	550.5p	**625.2p**	**7,280.9p**
Per cent change from 2014	-0.3%	-1.0%	-1.8%	-4.4%	-5.4%	0.9%	2.5%	0.2%	1.8%	-0.5%	-2.8%	**1.7%**	**-0.7%**
Domestic	398.2p	380.9p	421.4p	413.4p	438.7p	490.9r	559.6p	583.4p	493.6p	472.4p	405.5p	**469.1p**	**5,527.0p**
Per cent change from 2014	-2.7%	-2.9%	-1.3%	-5.9%	-4.6%	2.7%	4.4%	2.0%	3.0%	1.3%	0.1%	**7.6%**	**0.5%**
Transborder	118.2p	119.7p	129.1p	119.3p	95.1p	82.5p	93.5r	93.6p	81.3p	97.0p	98.8p	**100.1p**	**1,228.1**
Per cent change from 2014	-0.3%	-3.0%	-7.8%	-9.0%	-12.9%	-10.2%	-10.1%	-13.2%	-10.8%	-12.9%	-17.3%	**-19.8%**	**-10.5%**
International	65.7p	61.0p	63.2p	60.1p	31.6p	25.4p	30.6p	32.9p	27.3p	25.6p	46.2p	**56.1p**	**525.8p**
Per cent change from 2014	16.8%	17.9%	9.8%	21.8%	10.5%	9.0%	14.6%	14.3%	27.4%	27.0%	11.5%	**4.0%**	**14.5%**
Calgary International Total	1,199.0p	1,149.3r	1,267.0r	1,225.7p	1,257.1p	1,304.8r	1,512.8r	1,557.4p	1,289.3p	1267.5r	**1,143.6r**	**1,296.2p**	**15,475.8p**
Per cent change from 2014	2.3%	-0.4%	1.5%	-2.3%	2.6%	3.2%	4.6%	1.8%	2.1%	-0.7%	**-1.8%**	**2.6%**	**1.4%**
Domestic	800.6p	765.0p	839.7r	844.4p	909.8r	955.1r	1,100.8r	1,143.6p	944.0p	929.5r	**813.5r**	**918.1p**	**10,970.4p**
Per cent change from 2014	1.1%	-0.9%	2.3%	-2.9%	4.8%	4.3%	4.7%	2.3%	3.4%	0.0%	**-0.8%**	**4.9%**	**2.1%**
Transborder	254.6p	253.4p	280.9p	252.1p	237.5r	243.5p	286.9r	285.5p	242.0p	244.6	**223.0r**	**244.9p**	**3049.0p**
Per cent change from 2014	1.8%	-3.0%	-3.7%	-6.3%	-4.6%	2.9%	4.6%	1.1%	-0.1%	-4.8%	**-4.5%**	**-5.5%**	**-1.8%**
International	143.8p	130.8p	146.5p	129.2p	109.7p	106.2p	125.0r	128.3p	103.2p	93.4	107.1p	**133.2p**	**1,456.4p**
Per cent change from 2014	9.9%	8.0%	8.0%	10.6%	1.1%	-5.8%	4.5%	-0.7%	-3.4%	4.6%	-3.5%	**3.7%**	**3.3%**
Fort McMurray International Total	97.6	91.0	97.3	93.5	92.1	98.1	97.5	98.2	93.8	87.4	79.5	73.60	1,099.6
Per cent change from 2014	-3.6%	-8.6%	-10.0%	-15.1%	-17.3%	-14.9%	-16.9%	-13.9%	-19.0%	-24.2%	-22.0%	-25.2%	-16.0%
Highway Count 2015 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	57.7	57.3	64.7	72.8	80.1	85.4	111.1	109.4	80.9	80.3	64.4	**72.1**	**936.2**
Per cent change from 2014	3.2%	2.3%	3.9%	1.8%	3.6%	2.2%	6.8%	-1.0%	2.1%	-1.7%	0.0%	**-0.1%**	**1.9%**
Hwy 1 - Banff Pk Gate (2-way)	501.8	505.5	544.6	568.2	679.2	705.5	953	977.6	693.9	590.0	467.9	**559.4**	**7,746.6**
Per cent change from 2014	6.1%	12.6%	9.1%	6.7%	15.9%	6.9%	8.1%	-0.5%	7.5%	4.7%	14.5%	**5.6%**	**7.4%**
Hwy 16 - Jasper Pk Gate (2 way)	96.3	92.8	111.7	123.4	149.2	167.9	233.7	254.3	161.8	125.2	84.4	**103**	**1,703.7**
Per cent change from 2014	4.9%	9.6%	6.2%	-1.0%	7.0%	3.6%	4.1%	-4.0%	4.8%	-0.1%	1.0%	**-5.0%**	**2.1%**
Hwy 16 - Blackfoot w-bound	164.1	146.6	170.8	177.8	186.6	188.3	202.7	196.8	179.3	185.5	162.1	**162.8**	**2123.4**
Per cent change from 2014	-3.2%	-7.0%	-6.5%	-5.2%	-7.0%	-5.9%	-7.8%	-11.9%	-11.5%	-11.8%	-9.1%	**-9.7%**	**-8.2%**
National Park Attendance (000's of visitors) 2015 [3] Does not include Group Tours													
Banff	184.9p	188.6p	203.8p	246.7p	296.4p	326.0p	630.5p	631.3p	433.0p	145.8p	116.7p	**148.1p**	**3,551.8p**
Per cent change from 2014	8.1%	14.6%	10.7%	6.7%	14.8%	8.6%	12.4%	-0.3%	8.8%	3.7%	12.7%	**4.5%**	**8.1%**
Jasper	52.8p	53.6p	64.1p	147.1p	178.1p	200.8p	433.3	444.9p	296.7p	61.1p	41.5p	**52.7p**	**2,026.7p**
Per cent change from 2014	6.0%	11.1%	7.4%	3.5%	10.3%	5.5%	10.1%	-2.0%	7.6%	1.7%	4.7%	**-2.0%**	**5.3%**
Waterton Lakes	6.7p	7.5p	9.3p	14.8p	39.2p	73.5p	114.3p	114.1p	59.7p	22.0p	7.9p	8.0p	477.0p
Per cent change from 2014	3.5%	19.1%	47.6%	34.5%	26.9%	22.9%	11.5%	6.8%	12.2%	19.6%	46.3%	23.1%	15.3%
Employment (000's of persons) 2016 Seasonally Adjusted [4]													
Accommodation and Food Services	**138.0p**												**138.0p**
Per cent change from 2015	**-12.0%**												**-12.0%**

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada, Statistics Canada.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Accommodation Indices 2015 [5]													
Edmonton Occupancy Rate	54.4%	65.3%	67.1%	67.7%	64.3%	69.7%	64.8%	63.9%	64.5%	63.1%	62.2%	**47.9%**	**63.0%**
Point change from 2014	-3.9	-2.8	-7.1	-7.6	-9.1	-0.1	-1.2	-13.3	-0.6	-9.2	-11.9	**-7.1**	**-6.6**
Average Daily Room Rate	$131.29	$134.52	$135.93	$134.91	$133.27	$138.75	$132.4	$132.58	$135.14	$135.73	$137.19	**$130.42**	**$135.64**
Variance from 2014	1.4%	1.0%	0.5%	0.2%	-0.8%	1.3%	0.9%	-4.2%	-2.2%	-1.6%	-2.6%	**-3.4%**	**-1.1%**
Revenue per available room	$71.42	$87.81	$91.22	$91.40	$85.73	$96.77	$85.77	$84.73	$87.13	$85.67	$85.28	**$62.51**	**$85.44**
Calgary Occupancy Rate	55.0%	61.8%	63.5%	64.1%	69.8%	70.2%	78.1%	75.3%	71.1%	63.3%	54.3%	**45.1%**	**64.3%**
Point change from 2014	-3.0	-1.6	-4.1	-7.5	-1.1	-6.3	0.1	-3.9	-8.4	-10.5	-12.6	**-7.9**	**-5.6**
Average Daily Room Rate	$156.48	$156.30	$156.76	$159.31	$159.78	$171.43	$185.06	$147.53	158.12	$154.05	$150.66	**$137.35**	**$157.47**
Variance from 2014	-0.4%	-3.3%	-2.0%	-2.8%	-2.2%	-7.1%	-2.5%	-1.6%	7.2%	-8.7%	-7.0%	**-8.2%**	**-4.9%**
Revenue per available room	$86.08	$96.56	$99.56	$102.11	$111.55	$120.33	$144.48	$111.16	$112.36	$97.45	$81.88	**$61.94**	**$101.27**
Alberta Resorts Occupancy Rate	40.8%	53.3%	48.8%	48.9%	60.6%	78.7%	90.9%	92.4%	82.6%	58.7%	37.7%	**50.4%**	**62.3%**
Point change from 2014	2.8	7.8	3.7	2.7	-0.2	2.9	2.9	0.7	1.9	4.1	-3.9	**1.0**	**2.5**
Average Daily Room Rate	$183.23	$177.86	$176.03	$170.91	$201.13	$260.92	$294.18	$299.60	$260.20	$190.13	$168.14	**$244.97**	**$232.32**
Variance from 2014	10.5%	1.3%	5.4%	4.8%	6.8%	8.2%	10.9%	10.1%	12.8%	6.7%	2.2%	**11.4%**	**8.4%**
Revenue per available room	$74.83	$94.88	$85.94	$83.51	$121.88	$205.47	$267.52	$276.75	$214.84	$111.56	$63.30	**$123.51**	**$144.83**
Other Alberta* Occupancy Rate	52.5%	55.0%	53.3%	48.3%	51.3%	58.6%	59.0%	57.0%	56.1%	50.5%	46.0%	**33.2%**	**51.7%**
Point change from 2014	-7.5	-11.5	-14.6	-11.4	-13.1	-8.3	-9.5	-14.0	-15.6	-19.3	-20.4	**-16.0**	**-13.5**
Average Daily Room Rate	$133.36	$132.26	$131.29	$128.86	$126.21	$127.84	$128.17	$127.47	$126.80	$124.74	$125.41	**$119.40**	**$128.03**
Variance from 2014	2.7%	1.1%	0.3%	-0.7%	-2.2%	-1.9%	-1.5%	-2.5%	-4.3%	-5.8%	-4.9%	**-9.2%**	**-2.2%**
Revenue per available room	$69.96	$72.74	$70.01	$62.20	$64.77	$74.90	$75.63	$72.71	$71.08	$62.98	$57.67	**$39.63**	**$66.16**
Total Alberta (excl. Resorts) Occupancy Rate	53.8%	60.0%	60.2%	58.6%	60.4%	65.3%	66.5%	64.5%	63.1%	57.9%	53.2%	**41.0%**	**58.7%**
Point change from 2014	-5.2	-6	-9.3	-9.0	-8.5	-5.3	-4.1	-10.8	-10.6	-13.8	-15.7	**-11.0**	**-9.1**
Average Daily Room Rate	$139.70	$140.35	$140.75	$141.06	$139.71	$145.07	$149.69	$135.98	$140.05	$137.83	$137.22	**$129.04**	**$140.03**
Variance from 2014	1.4%	0.0%	0.1%	-0.9%	-1.2%	-3.1%	-0.2%	-2.2%	-4.2%	-5.1%	-4.3%	**-6.6%**	**-2.4%**
Revenue per available room	$75.12	$84.22	$84.76	$82.69	$84.39	$94.68	$99.53	$87.74	$88.31	$79.86	$72.94	**$52.91**	**$82.24**
Food Services and Drinking Places 2015 ($ Millions) unadjusted [9]													
Total Receipts for Alberta	$689.4r	$658.1r	$729.7r	$719.6r	$766.1r	$741.1r	769.4r	761.12r	**735.74r**	**752.93r**	**705.67p**		**729.89p**
Per cent change from 2014	6.0%	4.4%	1.6%	1.6%	1.7%	0.5%	1.9%	0.3%	**0.1%**	**-1.8%**	**-2.9%**		**1.1%**
Historic Sites and Museums 2016 (000's of visitors) [7]													
Visitor Attendance	**10.6p****												**10.6p**
Per cent change from 2015	**-5.9%**												**-5.9%**
Exchange Rates 2016 [8]													
Canadian Dollar/U.S. Dollar (noon)	**0.70**												**0.70**
Canadian Dollar/ Euro	**0.65**												**0.65**
Canadian Dollar/ Great British Pounds	**0.49**												**0.49**
Oil Price: Western Texas Intermediate (WTI) 2016 [9]													
Cushing, OK Spot Price (US Dollar per Barrel)	**31.68**												**31.68**
Hotel Projects Valued $5 million or Greater 2015 ($ Millions) [10]													
Total Value of Hotel Projects Inventory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	$1,200	$814	**$796**	**$796**
Sources: CBRE Limited, Statistics Canada, Alberta Culture, Bank of Canada, WTI, Government of Alberta													

*Other Alberta includes Lethbridge, Red Deer, and other Alberta communities

**Please note that the Royal Alberta Museum closed on December 6, 2015. See Notes section for details.

Note : New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports.
Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport Websites.

2. Highway Traffic: These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data are included in the annual edition of the Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Other Alberta includes Lethbridge, Red Deer, and other Alberta communities.

Revenue per available room is calculated using the occupancy rate and average daily room rate.
Source: CBRE Limited with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at www.cbre.ca.

6. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

7. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station. **The Royal Alberta Museum closed on December 6, 2015. As a result Royal Alberta Museum visitation numbers were removed from the visitor attendance numbers starting January 2016, in order to make comparison with previous years and growth rate calculations possible. The Tyrrell Field Station closed on weekends and holidays starting October 17th.

8. **Exchange Rate**- this is the average monthly exchange rate.
Source: Bank of Canada.

9. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

10. Major hotel projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at $5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.
Source: Government of Alberta. http://majorprojects.alberta.ca/

22-Feb-2016